PeopleSoft Termination Checklist HR/Payroll/Benefits



October 18, 2005

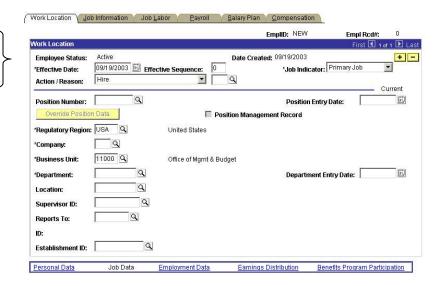
This checklist highlights the Menu Items, Components, and Pages necessary for basic initial processing. The checklists focus on the most common general situations. For specific detail see relevant manual.

HR/Payroll Checklist for Termination

HR: (Navigation: Administer Workforce > Administer Workforce (GBL) > Use > Job Data)

Termination (work location tab)

- Insert an effective dated row (day after last day worked)
- Enter appropriate Action
- Enter appropriate Reason
- Save!

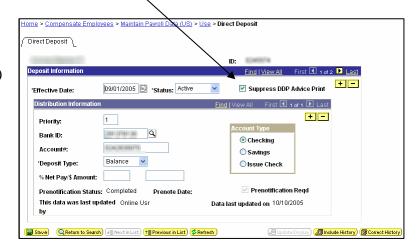


Payroll:

(Navigation: Compensate Employees> Maintain Payroll Data (US)> Use>Direct Deposit)

The Suppress DDP Advice Print box needs to be unchecked upon termination. The employee will then receive a printed DDP Advice.

Add an effective dated row (1st day of the termination month) Uncheck the box for Suppress DDP Advice Print



Benefits Administration:

For specific detail, see Benefits Administration Manual, or Event Maintenance Exercises in Benefits Administration Manual.

- 1. **Verify BAS Activity** (navigation: Compensate Employees>Administer Automated Benefits>Use>BAS Activity).
- 2. **Assign events to a schedule** (This is a centralized activity run by NDPERS a minimum of three times per day.)
- 3. Validate Process Status and Prepare for Finalization (navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or processing Controls Update).
- 4. *Finalize/enroll* (navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control).
- 5. **Verify Base Benefits Termination** (navigation: Compensate Employees>Administer Base Benefits>Use {health plans, life and add, leave plans, etc.})